

Strategic Plan Summary

The mission statement of the Zoological Society of San Diego states that the Society is “a conservation, education, and recreation organization dedicated to the reproduction, protection, and exhibition of animals, plants, and their habitats.” In order to carry out our bold mission, the Society has developed a multi-faceted strategic plan that presents the values that have always been important to us, our vision for the future, and detailed steps designed to bring our vision to life.

The Zoological Society’s vision was developed by a 24-member team that had representatives throughout the Society’s staff and Board, including the Board of Trustees vice president, the executive director and a broad spectrum of leaders from 15 departments within the Society. The vision team also received guidance from an expert consulting group, One-Earth Associates, who has extensive background in strategic planning.

The Zoological Society has identified our vision statement of “*becoming a world leader in connecting people to wildlife and conservation*,” which was approved by the Board of Trustees on July 22, 2003. To accomplish our vision, we have developed six fundamental elements of success: (1) to share the wonder of nature by delivering memorable educational and entertaining experiences that consistently meet the highest expectations; (2) to continuously reinvent our core business and judiciously build pioneering enterprises; (3) to choose to do conservation and provide science-based animal care that makes a difference for key wildlife and habitat concerns; (4) to integrate our science with our living resources to enhance the value of our work; (5) to communicate inspiring wildlife and conservation stories that enrich people’s lives; and (6) to achieve widely recognized results for ourselves and for our partners. In all of these things, the Society will lead by example in order to make a difference in conserving nature, both locally and globally.

Upon approval of the new vision, strategic planning teams were formed to develop four plans to translate our vision into action. The strategic planning process involved 167 employees, as well as volunteers and external experts. The completed plan is called “The Lynx: Connecting People to Wildlife and Conservation.” The Lynx focuses on four key areas: facilities, conservation, interpretation and supporting processes. Each area includes objectives that are necessary to achieve major results, the strategies that we will employ to meet the objectives, and the performance measures that will be used to evaluate the plans’ effectiveness. The highlights of the plans are as follows:

1. Facilities Plan Philosophy: To create facilities that provide unparalleled and enriching environments for animals and awe-inspiring, repeatable family experiences for our guests.

Objective: (1) To create, implement and maintain a Master Plan (both physical and operational) for all facilities that is inspired by the Zoological Society of San Diego’s vision.

2. Conservation Philosophy: To engage in integrated conservation action; and to provide science-based care for our collections that makes a positive difference for species, ecosystems, and habitats, locally and globally.

Objectives: (1) Maximize the sustainability of our unique living collections; (2) Lead and support local and global wildlife conservation efforts; (3) Ensure that science within ZSSD focuses on sustainability of our living collections, and on wildlife conservation efforts; (4) Maximize recognition for ZSSD and partners as active participants in the conservation arena; and (5) Increase funding for conservation.

3. Interpretive Plan Philosophy: To connect people to wildlife by creating unique moments that remain with them forever; moments that plant the seeds to inspire action that protect and nurture our natural world.

Objectives: (1) Invigorate how we tell our stories. Refine and improve how we deliver our messages. Speak with one voice, integrating communication channels and content in all message mediums, including marketing, PR, special speakers, worldwide tours, outreach programs, guided tours, guest interpretation, classes, all audio/visual applications, and ZSSD employees and volunteers acting as ZSSD messengers (2) Increase awareness of who we are (the ZSSD essence), resulting in greater loyalty and commitment to our mission. (Essence means the whole ZSSD story – all of what we do.); (3) Attract, inspire, and motivate people to help us with conservation efforts (“Helpers” include sponsors, donors, partnerships, individuals, and community groups.); (4) Honor our heritage; renew our commitment to children to insure our engagement with and connection to future generations.

4. Supporting Processes Philosophy: To align our workforce with our vision through innovations in human resources, change management, integration, and organizational effectiveness.

Objectives: (1) Align our workforce with our vision; (2) Create an internal environment of understanding and respect for each division’s value contribution and responsibilities; (3) Instill in all who encounter the ZSSD that we are an organization aligned with and truly committed to our vision; (4) Insure that the Facilities, Interpretation, and Conservation portions of our strategic plan are completely integrated; (5) Ensure that staff, Board, and other volunteers are pulling together toward our common objectives; (6) Ensure that the right resources are in the right place at the right time.

The plans were finalized in August, 2004. Currently, the plans are being broken down into annual operating plans that will be evaluated at regular intervals through various performance measures. These measures are likely to include but not be limited to, results from guest surveys and media reports, the Society’s impact on local and global wildlife management and conservation science through publications and education, AZA and other peer recognition for leadership roles in science and conservation, increasing levels of partnerships, funding and guest attendance. Monitoring and measuring both the plan and changes in the external environment will result in continued adjustments until we have become world leaders in connecting people to wildlife and conservation.

Museums for America Project Narrative

1. Project – Design

In order to enhance our guests' understanding and appreciation of wildlife, the San Diego Zoo's Wild Animal Park has embarked upon a redesign of its educational railway tour. With funds from the Institute of Museum and Library Services, we will be able to provide an educational adventure that will engage more than one million individuals each year. **IMLS funds would provide interpretative training for our tour narrators, educational materials and video technology for both of the new tours and an evaluation of our guest experience throughout the project.** By enhancing our educational tour experience, the following goals will be accomplished:

1. Offer new, intimate viewing and learning opportunities to our general public, school and community groups, individuals with special needs and families with young children.
2. Provide every guest to the Park with valuable insight into exotic wildlife that will connect him or her to wildlife and motivate him or her towards active conservation.
3. Create opportunities to share our educational message in dramatic and memorable ways.
4. Share current information about the Zoological Society's field studies and conservation efforts around the world.

Each year, the Wild Animal Park, a unique wildlife sanctuary and educational facility, motivates nearly 1.5 million individuals of all ages and walks of life towards a deep love and commitment to the natural world. The Park strives to share the wonders of nature through the exhibition of animals and plants in spacious settings similar to their homelands. It features exhibits for more than 3,600 animals of 416 species and 3,500 species of plants within its 1800 acres, and provides guests with an opportunity to observe the natural behaviors of animals as they relate to species with whom they co-exist in the wild. This unique glimpse of exotic wildlife in an extremely natural setting has made for one of the most powerful and memorable learning opportunities found anywhere. To share this experience with our guests, the Park has offered a 60-minute guided tour via an electric-powered monorail that travels along a five-mile tour route and offers views of the animals from a high vantage point. Since the Park's opening in 1973, over 34 million guests have enjoyed a tour on the railway. Last year, 1,149,810 guests rode the railway.

While this view is impressive, the new system will transform the existing five-mile railway route into two distinct two-mile tour routes; one route will focus on African animals and the other on Asian animals. Currently, the existing tour route alternates between the two geographical regions, making it difficult for our guests to comprehend the native homelands of our animals. By offering two free 35-minute tours, we will enhance our guest experience by providing two cohesive educational themes focusing on animals from two regions; providing guided safari tours to all visiting school groups; and offering increased flexibility and conveniences to our guests with special needs and to families with young children. The new tours will be capable of serving up to 23,040 guests per day, compared to our existing railway, which can serve up to 11,520 per day, and provide additional space for wheelchairs and strollers, accommodating a greater capacity of individuals with special needs and families with young children.

The new system will be uniquely designed to immerse our guests in nature in order to illustrate habitat diversity, offer special insight into African and Asian cultures and enable guests to experience the thrill of being a field researcher. Immediately as our guests arrive at the boarding platforms, the sights and sounds of Africa or Asia will surround them. At the African platform, African music will play quietly in the background, brightly colored fabrics will hang from the walls,

and an African map will highlight the natural habitats of many of the Park's wildlife species. The Asian platform will also create a cultural connection using baskets, fabrics and artwork to represent the diversity of Asian people. While on the tour, guests will be transported to enchanting far away places where they will have the opportunity to see, hear and smell exotic animals from these countries. They will also enjoy traversing through water elements that will provide refreshing relief on hot days. Cultural architectural elements will be placed adjacent to the pathway to enhance the safari experience, and horticulture will serve as portals into the two cultures. The guests will learn intriguing facts and stories about exotic wildlife and their unique adaptations in the wild. They will hear enlightening stories about endangered species that have escaped the brink of extinction including the Przewalski's horse and southern white rhinoceros. The safari adventure will also ensure that our guests leave feeling inspired and equipped with simple strategies of how they can become active stewards of the natural world.

To enhance our educational message, state-of-the-art video technology will enable us to share behind-the-scenes video footage of our collection and conservation efforts worldwide. The guests will be able to view video screens in several locations on each vehicle. The narrator will use these screens to provide our guests with viewing opportunities that cannot be seen from the vehicle. The guests might view a video clip of the birth of a giraffe as they pass the mother and her calf, watch a clip of a Zoological Society sponsored conservation program as the vehicle passes a highlighted species, or view an animal receiving specialized veterinary care. In addition, this medium will help us present the alarming situation of the natural habitat of many of these species by projecting past and current range maps on the screens. The video technology will also provide our guests with the most up-to-date information on conservation and science.

Another dramatic change in the new railway project is the new viewing location. Rather than keeping guests above the enclosures and looking down on the wildlife, the new tours will immerse them in nature, allowing them to experience the sights, sounds and scents of exotic animals from Africa and Asia. It will be rerouted to offer closer views of the animals as they interact with one another, feed on vegetation, drink from waterholes and exist as they would in their native homelands. In several locations, the new safari vehicles will go into the field enclosures, within close range of entire herds of animals.

2. Grant Program Goals

The Wild Animal Park's new educational tour experience addresses the Museums for America's definition of "**supporting lifelong learning**" as it enables the Wild Animal Park to share its animal collection and inspiring messages about plants, animals and conservation through two intriguing guest experiences that will create lasting memories and a deep concern for nature. The education mission of the Zoological Society of San Diego is to increase the knowledge and appreciation of animals and plants, in people of all ages, through a wide variety of educational programs and services, utilizing the resources of the San Diego Wild Animal Park and the San Diego Zoo. Specifically, we want our guests to:

1. Gain an appreciation of the diverse African and Asian environments and its wildlife.
2. Value the role played by the Zoological Society of San Diego in wildlife conservation within the Park, in the local environment and around the world.
3. Recognize that each person is a part of and has an impact on the natural world.
4. Identify actions each person can take to support conservation efforts.

To support this goal of life-long learning, the new transportation system will reach Wild Animal Park guests with a memorable and up-close encounter with rare and endangered animals

from all over the world. The two multi-sensory, narrated tours will provide the Education staff with a "traveling classroom" that will accomplish our goal of providing guests with new knowledge, an enhanced emotional connection to wildlife and a desire to take conservation action themselves. The tours will encourage a lifestyle of respect and appreciation for the natural world.

Throughout each 35-minute adventure, a Park educator will share inspiring stories about wildlife, science and conservation that will touch the hearts and minds of our guests. With IMLS funds, special training sessions will be offered to the tour narrators that will encourage a "conservation conversation" with our guests. The shorter tour route makes the time spent with our guests even more valuable. We need to be sure to share wildlife conservation and natural history information in a way that connects to the guests' experiences, answers their questions and sparks their curiosity. Our ultimate goal is to give all of our guests a deeper respect and appreciation for wildlife, which, we hope will lead to conservation action.

In addition to providing enhanced educational services, the new safari adventure will serve thousands of students and teachers each year. Too often classroom science lacks active problem solving and a connection with the real world. The new tours will bring science to life for all students. The Park's Education staff will be able to provide specialized guided tours for all grade levels that will link to the California State Science Standards and every teacher will receive a confirmation packet, which includes a pre-visit lesson, suggested readings and vocabulary words. The school tours will challenge "young field biologists" to solve a conservation-related problem during their exploration. In addition to explaining about the wildlife that the students view, Park educators will utilize hands-on materials, including feathers, models of animal teeth, and fur samples, to further student curiosity and learning. In 2003, Park educators partnered with Monroe Clark Middle School, which led to extensive conversations between Park staff and classroom teachers. Through these discussions the idea of a tour "field guide" was suggested that will provide each student with a document where they could record animal behaviors that they view from the vehicle, make quick sketches of the wildlife and bring back to the classroom for further study. The design of all educational materials will take the team effort of a teacher advisory committee, the Wild Animal Park's Education and Animal Care staff and representatives of the Center for the Reproduction of Endangered Species (CRES).

To ensure that we continue to provide the best educational experience, a detailed evaluation will be performed throughout the project. The Park's existing railway system will first be tested to provide a "benchmark" of the current visitor experience. Once the Asian tour is open, in May 2006, evaluation studies will be conducted to measure the difference between the original railway and the first tour route. This data will not only guide improvements to the new Asian tour, but also direct the development of our approach to the African tour. We will also conduct follow up studies with teachers and students to learn how the field journal activity and educational materials were continued in the classroom.

3. Project – How The Project Fits Into Our Strategic Plan And Mission

The new educational safari adventure at the Wild Animal Park will effectively accomplish the Society's mission and strategic objectives and serve as an essential investment toward our institutional capacity. The new experience will achieve our mission of being "*a conservation, education, and recreation organization dedicated to the reproduction, protection, and exhibition of animals, plants, and their habitats*" by providing an opportunity to educate every guest to the Park about our diverse collection and inspire them with new knowledge, an enhanced emotional connection to wildlife and a desire to become active stewards of the natural world. In particular, the educational components provided with IMLS funds would enable us to serve our guests of all ages by bringing them closer to exotic animals and helping them better understand and appreciate wildlife.

Throughout the planning process for the educational experience, project leaders referred to the Society's strategic goals and mission statement and the Wild Animal Park's Long Range Plan as guides to ensure the project aligns with our institutional goals. The experience is also in accordance with the Society's vision of *"connecting people to wildlife and conservation"* as it offers our guests enhanced educational encounters with exotic animals and instills in them a passion for the natural world and conservation. The educational tours also strictly adhere to the goals of our strategic plan by accomplishing its interpretive plan stating that we will *"connect people to wildlife by creating unique moments that remain with them forever; moments that plant the seeds to inspire action that protect and nurture our natural world"* and its facilities plan of *"creating facilities that provide unparalleled awe-inspiring, repeatable family experiences for our guests."* The specifics of each plan are addressed in our strategic plan summary.

The new educational experience will greatly expand our current institutional capacity of more than 4 million guests per year by providing for future growth, increasing our reach to our general public, school and community groups, individuals with special needs and families with young children. This past year, a total of 1,149,810 guests enjoyed an educational experience on our existing railway system. With our new experience, we will increase our yearly maximum capacity and provide our growing audience with educational and enjoyable tours for decades to come.

4. Strategic Plan – Process And Financial Resources

In August 2004, the Zoological Society of San Diego finalized its strategic plan, "The Lynx: Connecting People to Wildlife and Conservation," which will further our goals and objectives necessary for our future success. The plan was developed through an intensive planning process that examined our mission statement, core values and our future goals and objectives. The strategic planning process involved 167 employees, as well as representation from the Board of Trustees, community resource people, volunteers and a strategic planning consultant group. The team also based our strategic plan on analyses of visitors' exit interview data, the Society's key policies and organizational structure, marketplace trends, external opportunities and challenges.

The Zoological Society's financial resources support our strategic goals by providing the Wild Animal Park and San Diego Zoo with enhanced educational programs, increased conservation efforts and new or renovated exhibits that connect our guests to wildlife and conservation. More than ninety percent of the Park's costs of operation are offset by self-generated revenues. Donations are principally used to build new exhibits or replace or rebuild infrastructure (over 50 million in the past 5 years).

In addition, the Society has the largest membership of its kind in the world. The Circle of our Finest Friends provides leadership support for the Society through four donor levels (total giving of 15,000 and up). The President's Associates is a dynamic group of over 1,046 members who contribute \$1,000 or more annually to priority projects at the Wild Animal Park and Zoo. Our President's Partners (303 members) give \$2,500 or more annually. Four additional annual giving clubs ranging from Diamond Club (\$126 per year) to Director's Club (\$500 per year) offer a variety of benefit packages.

The Society also receives support from corporate and private foundations, planned giving and a variety of special fund raising events from plant sales to black-tie galas. The Development department solicits corporate and private foundations grants, raising more than \$3.7 million in 2003. An additional \$1.3 million was generated through corporate sponsorships. In 2003, the Society received more than \$3 million from donor bequests. The Society's black-tie gala, Rendezvous In The Zoo (RITZ) raised \$559,000 and our annual Celebration for the Critters party, raised \$340,000 to benefit CRES. Last year schoolchildren throughout the county did their part for CRES and generated more than \$27,848 for endangered species by participating in the annual Cans for Critters

aluminum-can recycling drive. All donation revenue is used solely for capital projects and programs, and is not for operating purposes.

5. Project – Appropriateness For Institution & Audience

Every guest to the Wild Animal Park will be able to enjoy an educational adventure on the new tour system that will offer up-close animal encounters and share in the wonder, excitement and enjoyment of the natural world. In particular, the new system will provide enhanced educational services to our:

1. General public, including families, adults, individuals with special needs and Senior Citizens.
2. School children and teachers from schools throughout San Diego, Riverside, Imperial, Orange, Los Angeles and San Bernardino Counties.
3. Community Groups serving children, youth, adults and families

The new tours will engage the Park's general public in a captivating Safari adventure unlike anything they have experienced before, without traveling to Africa or Asia. Our adventure will allow us to double our educational reach, offering two tours with greatly increased capacity. The tours will increase our reach to individuals with special needs by accommodating nine wheelchairs per train, compared to our existing railway, which provides space for only one per train. This will increase our maximum wheelchair capacity from 96 to 1,728 per day, for a maximum total of 630,720 wheelchairs per year, compared to 35,040 at present. The new adventure will also benefit community groups that serve children, youth, adults and families by providing additional space for large groups. In addition, the two shorter tours will offer our guests additional conveniences, as some of our guests choose not to ride our existing 60-minute tour due to personal comfort issues and the attention spans of their young children.

The new tours and educational materials will offer enhanced educational opportunities to schools throughout San Diego, Riverside, Imperial, Orange, Los Angeles and San Bernardino Counties. It will increase the number of tours available to school groups and offer additional specialized education programs aligned with the California State Science Standards. In 2001, the Park had to discontinue offering self-guided railway tours to school groups from April through mid June due to our capacity limitations (excluding our third-grade railway program). By discontinuing our self-guided tours, over 70,000 students were not able to enjoy an educational railway tour in 2003. With the new system, we will be able to offer self-guided tours to all elementary, junior high and high school classes visiting the Park and offer age-specific curricula that will arouse student curiosity and build their interest in science and conservation. It will also enhance our guided tours and sleepover programs for schools and families.

Visitor Demographics:

Through enticing and affordable programs, the Wild Animal Park strives to share the wonder, excitement and enjoyment of the natural world with persons of all ages in all walks of life. This past year, 1,293,403 people visited the Park. Approximately 30 percent of our visitors came to us from other states and nations. Last year, the Park's on-site and traveling education programs served 122,568 individuals from pre-school to adult levels. In order to share our conservation message and to encourage children to learn about wildlife, we offer free admission to every school group in San Diego County. In 2003-2004, San Diego County reported an enrollment of 499,356 students in kindergarten through 12th grade: 41% Hispanic, 39% White, 8% African American, 5% Asian, 5% Filipino, 1% American Indian and 1% Pacific Islander (California Department of Education, Educational Demographics Unit, 2004). In addition, the Society's website, which highlights

engaging educational information on conservation and wildlife, was visited by more than 320 million individuals in 2003.

Society membership, granting free year-round admission to the Wild Animal Park and San Diego Zoo, reached 240,509 households in 2003, representing more than 430,000 individual members. Koala Club children's memberships reached 133,040. Ten donor levels offer graduated benefits and privileges. Admission is free to children under three and U.S. military in uniform. Children through age 11 and senior citizens pay reduced admission fees. Group discount programs are offered to a variety of target audiences including military, social clubs, companies, youth groups and senior groups. To reach underserved groups, the Park is free to everyone on Founder's Day, observed the second Wednesday in May. Each December, thousands of passes are distributed to local charities for disadvantaged people who would not otherwise be able to visit. In addition, the Park offers the Animal Express therapy outreach program that delights seniors in nursing homes and children at abused children's centers with heartwarming visits from some of the Park's animals. In 2003, 1,403 individuals were served.

6. Project – Resource: Time & Budget

The Society's Board of Trustees and staff have shown great commitment to the new educational tour experience by dedicating extensive time and financial resources to the project. The funds requested from the Museums for America program will provide support for the adventure's educational materials, video equipment, interpretive training and evaluation of the guest experience. IMLS funds will not be used for construction of the tours. The educational materials will include graphics at the railway loading areas and curriculum materials for school children. Video technology will be built into the safari vehicles and feature behind-the-scenes video footage of our animal collection. IMLS funds will also provide training sessions for our narrators, enable us to conduct visitor studies to learn how to best reach our guests and provide opportunities to meet with curriculum specialists to discuss the new educational materials and its connection to classroom curriculum. The funds would be utilized from October 2005 until September 2007. Additional funding for the project will be sought from individuals, foundations and corporations by the Society's Development and Marketing departments. In addition, the Society has obtained a revenue bond to carry the project to its completion, which will be repaid over 30 years.

Construction of the new adventure is under way, with the Asian tour scheduled to open in June 2006 and the African tour scheduled in June 2007. Evaluation of the guest experience will take place at the start of the project, mid-project and at the completion of both tours. The interpretive training sessions for the tour narrators will take place in May 2006 (Asian tour) and May 2007 (African tour). The development of the school materials for both tours will be completed in May 2007, with the initial testing of draft materials being launched in June 2006 and tested on the Asian tour. The video equipment and video clips for the first tour will be installed by June 2006, with additional clips added to the second tour in June 2007. The project fits with the Park's overall activities, as our daily operations will not be effected by the development and construction of the educational tours. During the construction of the new system, tours will be unavailable to the public for only twenty-one working days, broken into three separate phases.

7. Project – Resources: Personnel & Technology

The educational safari adventure benefits from the collaborative efforts of the Society's Executive staff and staff from the Wild Animal Park's Operations and Education departments, with advice and guidance provided by a standing volunteer Wild Animal Park Committee composed of

Trustees, educators and community leaders throughout San Diego County. Among these leaders, the following professionals will accomplish the project's goals:

Michael Ahlering, Director of Park Operations, will provide on-site project management of the transportation system construction and ensure that it meshes with daily park operations. He will commit 25% of his time to the project. Since joining the Society in 1971, he has provided extensive experience and supervision in the planning and development of over 20 major renovation efforts at the Wild Animal Park and San Diego Zoo. He is responsible for setting the overall goals and coordinating the efforts of the multi-disciplinary Park Operations department.

Jason Van Hest, Transportation/Tours Supervisor, will coordinate staff training sessions and provide on-site supervision of the tour narrators, including hiring new narrators, scheduling tours and making staffing assignments. 20% of his time will be dedicated to the project. He has more than 12 years of supervisory and management experience and is directly responsible for all internal tour and transportation systems/operations at the San Diego Wild Animal Park.

Cynthia Wallace, Associate Director of Education, is the Project Director and will oversee, design and supervise implementation of all educational materials and programs offered to guests on the new system. 40% of her time will be dedicated to the project. She supervises over 20 Park Education professionals and facilitates the volunteer Education committee composed of Trustees, educators and other San Diego community representatives. She is a member of the American Association of Zoos and Aquariums, International Zoo Educators and National Science Teachers Association.

Tour Narrators – The 25 tour narrators will perform the daily activities of the transportation system operations including loading/unloading, vehicle operation, vehicle tour narration, answering questions and providing information to guests regarding the Wild Animal Park, animal exhibits and plant life. They will also attend training sessions to enhance their interpretation skills and connection to our guests. Desirable qualifications for these positions include schooling in the life sciences and prior public speaking experience. The tour narrators will be interviewed and selected by the Park's Tour Supervisor.

Project Budget Form

SECTION 1: SUMMARY BUDGET

Name of Applicant Organization Zoological Society of San Diego

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

DIRECT COSTS

	IMLS	Applicant	Total
SALARIES & WAGES	<u>0</u>	<u>328,368</u>	<u>328,368</u>
FRINGE BENEFITS	<u>0</u>	<u>42,090</u>	<u>42,090</u>
CONSULTANT FEES	<u>12,980</u>	<u>0</u>	<u>12,980</u>
TRAVEL	<u>1,500</u>	<u>0</u>	<u>1,500</u>
MATERIALS, SUPPLIES & EQUIPMENT	<u>135,520</u>	<u>0</u>	<u>135,520</u>
SERVICES	<u>0</u>	<u>0</u>	<u>0</u>
OTHER	<u>0</u>	<u>26,448,910</u>	<u>26,448,910</u>
TOTAL DIRECT COSTS	\$ <u>150,000</u>	\$ <u>26,819,368</u>	\$ <u>26,969,368</u>
INDIRECT COSTS	\$ <u>0</u>	\$ <u>2,790</u>	\$ <u>2,790</u>

TOTAL PROJECT COSTS \$ 26,972,158

AMOUNT OF CASH-MATCH \$ 1,000,000

AMOUNT OF IN-KIND CONTRIBUTIONS \$ 0

TOTAL AMOUNT OF MATCH (CASH & IN-KIND CONTRIBUTIONS) \$ 1,000,000

AMOUNT REQUESTED FROM IMLS, INCLUDING INDIRECT COSTS \$ 150,000

PERCENTAGE OF TOTAL PROJECT COSTS REQUESTED FROM IMLS 0.006 %
(MAY NOT EXCEED 50%)

Have you received or requested funds for any of these project activities from another federal agency?
(Please check one) ☐ Yes ☒ No

If yes, name of agency _____

Request/Award amount _____

Project Budget Form

SECTION 2: DETAILED BUDGET

Year ☒ 1 ☐ 2 ☐ 3 - Budget Period from 10 / 1 / 05 to 9 / 30 / 06

Name of Applicant Organization Zoological Society of San Diego

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	(1)	10hrs/wk x 46 wks	0	23,000	23,000
<u>[REDACTED]</u>	(1)	8hrs/wk x 46 wks	0	8,096	8,096
<u>[REDACTED]</u>	(1)	16hrs/wk x 46 wks	0	24,288	24,288
<u>[REDACTED]</u>	(25)	8hrs/wk x 16 wks	0	51,200	51,200
TOTAL SALARIES AND WAGES \$			0	106,584	106,584

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
N/A	(0)	N/A	0	0	0
	()				
	()				
	()				
TOTAL SALARIES AND WAGES \$			0	0	0

FRINGE BENEFITS

RATE		SALARY BASE	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	38 % of \$	23,000	0	8,740	8,740
<u>[REDACTED]</u>	38 % of \$	8,096	0	3,076	3,076
<u>[REDACTED]</u>	38 % of \$	24,288	0	9,229	9,229
TOTAL FRINGE BENEFITS \$			0	21,045	21,045

CONSULTANT FEES

NAME/TYPE OF CONSULTANT	RATE OF COMPENSATION (DAILY OR HOURLY)	No. OF DAYS (OR HOURS) ON PROJECT	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	\$300/day	5 days	1,500	0	1,500
<u>[REDACTED]</u>	\$380/day	7 days	2,660	0	2,660
<u>[REDACTED]</u>	\$100/teacher	10 teacher	1,000	0	1,000
TOTAL CONSULTANT FEES \$			5,160	0	5,160

TRAVEL

FROM/TO	NUMBER OF: PERSONS	DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
Portland, OR	(1)	(5)	500	250	750	0	750
to San Diego.	()	()					
CA	()	()					
	()	()					
TOTAL TRAVEL COSTS \$					750	0	750

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

Year ☒ 1 ☐ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Educational Graphics	Per consultant	15,000	0	15,000
School Curricula	Estimate	3,760	0	3,760
Video Equipment	Per consultant	96,000	0	96,000
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$		114,760	0	114,760

SERVICES

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
N/A	N/A	0	0	0
TOTAL SERVICES COSTS \$		0	0	0

OTHER

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
All trains, tours and boarding stations	Per consultants	0	12,788,557	12,788,557
TOTAL OTHER COSTS \$		0	12,788,557	12,788,557

TOTAL DIRECT PROJECT COSTS \$	120,670	12,916,186	13,036,856
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☐ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
☒ B. Federally negotiated indirect cost rate (see page 3.5).

Department of Health and Human Services

December 31, 2004

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

21.5 % of \$ 5,160 = \$ 1,109

IMLS Applicant

Total

C. Total Indirect Costs

\$ 0 \$ 1,109

\$ 1,109

Project Budget Form

SECTION 2: DETAILED BUDGET

Year ☐ 1 ☒ 2 ☐ 3 - Budget Period from 10 / 1 / 06 to 9 / 30 / 07

Name of Applicant Organization Zoological Society of San Diego

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

SALARIES AND WAGES (PERMANENT STAFF)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	(1)	10hrs/wk x 46 wks	0	23,000	23,000
<u>[REDACTED]</u>	(1)	8hrs/wk x 46 wks	0	8,096	8,096
<u>[REDACTED]</u>	(1)	16hrs/wk x 46 wks	0	24,288	24,288
<u>[REDACTED]</u>	(25)	8hrs/wk x 52 wks	0	166,400	166,400
TOTAL SALARIES AND WAGES \$			0	221,784	221,784

SALARIES AND WAGES (TEMPORARY STAFF HIRED FOR PROJECT)

NAME/TITLE	No.	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
N/A	(0)	N/A	0	0	0
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
<u> </u>	()	<u> </u>	<u> </u>	<u> </u>	<u> </u>
TOTAL SALARIES AND WAGES \$			0	0	0

FRINGE BENEFITS

RATE		SALARY BASE	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	38 % of \$	23,000	0	8,740	8,740
<u>[REDACTED]</u>	38 % of \$	8,096	0	3,076	3,076
<u>[REDACTED]</u>	38 % of \$	24,288	0	9,229	9,229
TOTAL FRINGE BENEFITS \$			0	21,045	21,045

CONSULTANT FEES

NAME/TYPE OF CONSULTANT	RATE OF COMPENSATION (DAILY OR HOURLY)	NO. OF DAYS (OR HOURS) ON PROJECT	IMLS	APPLICANT	TOTAL
<u>[REDACTED]</u>	\$300/day	5 days	1,500	0	1,500
<u>[REDACTED]</u>	\$380/day	14 days	5,320	0	5,320
<u>[REDACTED]</u>	\$100/teacher	10 teacher	1,000	0	1,000
TOTAL CONSULTANT FEES \$			7,820	0	7,820

TRAVEL

FROM/TO	NUMBER OF: PERSONS DAYS	SUBSISTENCE COSTS	TRANSPORTATION COSTS	IMLS	APPLICANT	TOTAL
Portland, OR	(1) (5)	500	250	750	0	750
to San Diego,	() ()					
CA	() ()					
<u> </u>	() ()					
TOTAL TRAVEL COSTS \$				750	0	750

Project Budget Form

SECTION 2: DETAILED BUDGET CONTINUED

Year ☐ 1 ☒ 2 ☐ 3

MATERIALS, SUPPLIES AND EQUIPMENT

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
Educational Graphics	Per consultant	15,000	0	15,000
School Curricula	Estimate	3,760	0	3,760
Video Equipment	Per consultant	2,000	0	2,000
TOTAL COST OF MATERIALS, SUPPLIES, & EQUIPMENT \$		20,760	0	20,760

SERVICES

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
N/A	N/A	0	0	0
TOTAL SERVICES COSTS \$		0	0	0

OTHER

ITEM	METHOD OF COST COMPUTATION	IMLS	APPLICANT	TOTAL
All trains, tours and boarding stations	Per consultants	0	13,660,353	13,660,353
TOTAL OTHER COSTS \$		0	13,660,353	13,660,353

TOTAL DIRECT PROJECT COSTS \$	29,330	13,903,182	13,932,512
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INDIRECT COSTS

Check either item A or B and complete C. (See section on Indirect Costs, page 3.5.)

Applicant organization is using:

- ☐ A. An indirect cost rate which does not exceed 15 percent of modified total direct costs charged to IMLS.
☒ B. Federally negotiated indirect cost rate (see page 3.5).

Department of Health and Human Services

December 31, 2004

Name of Federal Agency Expiration

Date of Agreement

Rate base Amount(s)

21.5 % of \$ 7,820 = \$ 1,681

	IMLS	Applicant	Total
C. Total Indirect Costs	\$ 0	\$ 1,681	\$ 1,681

Budget Justification

The funds requested from the Museums for America program will provide support for the educational materials, video equipment, interpretive training and evaluation required for the Wild Animal Park's new safari transportation system. The funds will be utilized from October 2005 until September 2007.

Principal project participants and their roles:

Zoological Society of San Diego Staff

**(No Museums for America funds are requested for Society staff)*

[REDACTED] – San Diego Wild Animal Park

Role: On-site coordination of the transportation system construction and educational technology components. 25% of his time will be dedicated to the project.

[REDACTED] – San Diego Wild Animal Park

Role: On-site supervision of assigned staff in the conducting of tours, including scheduling tours and making staffing assignments; and coordination of staff training sessions. 20% of his time will be dedicated to the project.

[REDACTED] – San Diego Wild Animal Park

Role: On-site project management, coordination of the educational components and curriculum for the new transportation system, overseeing evaluation of materials and guest experience. 40% of her time will be dedicated to the project.

[REDACTED] – San Diego Wild Animal Park

Role: The 25 narrators will participate in the interpretive training sessions for the new transportation system, and will provide guests to the Park with a fun and educational safari experience that will grow their commitment to wildlife and conservation.

Consultants:

[REDACTED]

Role: Work with staff members to initiate and shape interpretive planning efforts for the educational railway tour, planning and leading training sessions with staff members. Her contracted salary is \$3,000 for ten days of work.

[REDACTED]

Role: Conduct long-term evaluation of the project and production of formative, preliminary and final evaluation results. Her contracted salary is \$7,980 for 21 days of labor including data collection, analysis, and summary of results.

Panel of teachers, Development of educational materials

Role: Consulting fees for ten teachers who will serve in the development of educational materials for student use. Each of teachers will receive \$200 for their assistance in developing the materials for both tours.

Selection of Consultants:

The Zoological Society of San Diego selected Mary Kay Cunningham and Karen Kahn based on interviews and recommendations from top professionals with experience in interpretive training and evaluation. They both have extensive experience and expertise to carry out our project to its completion. The Wild Animal Park's Associate Education Director facilitated the selection of Ms. Cunningham and Ms. Kahn.

Ten science teachers will be selected from various grade levels to be a part of the curriculum development process. All of the teachers will have participated in a Park education program in the past, so they are familiar with our programs. The teachers will also be selected by the Park's Associate Education Director.

Travel

Mary Kay Cunningham, the project's Interpretation Specialist, will be commuting from Portland, Oregon to San Diego, California. She will require \$150 per day to cover hotel, transportation and meals, for a total of \$1,500 for ten days.

Materials, Supplies and Equipment

This section of the detailed budget includes all of the educational materials and video equipment required for the new transportation system. This includes the educational graphics at the boarding areas, printed school materials and curricula, and video equipment and production of video clips. The total cost for this section was determined by the consultants and are appropriate with market trends and product rates.

Other

This section includes all of the materials, supplies and equipment required for the new transportation system. This includes, but is not limited to, the tour vehicles, loading stations and facilities. The total cost for this section was determined by the consultants and are appropriate with market trends and product rates.